



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone on 8-16 lb. hens and 16-24 lb. toms was steady. No sales reported. Demand generally slow as buyers are cautious and selective. Parts and meats trading was slow. Demand was light to moderate. The market tone was mixed with drums under pressure due to increased availability. White meat items continue to be steady to firm and held with confidence.



EXPORT MARKET HIGHLIGHTS

Trading centered on a moderate volume of tom drums, a light volume of thigh meat, balance slow. Demand was limited.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 25, 2004**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	OPEN COMMITMENTS 7/ VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-64	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	62-64	-	-	-	-	-	-	-	-
WESTERN REGION 5/	62-66	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-61	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 26, 2004**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	OPEN COMMITMENTS 7/ VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-64	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	62-64	-	-	-	-	-	-	-	-
WESTERN REGION 5/	62-66	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-61	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF MARCH 26, 2004	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	61.00	62.50 **	59.03
CENTRAL REGION	63.00 **	63.00 **	60.80 **
WESTERN REGION	66.00	63.00 **	61.50 **
16-24 LB TOMS			
EASTERN REGION	59.00	60.00 **	57.50
CENTRAL REGION	61.00 **	61.00 **	56.50
WESTERN REGION	61.00 **	61.00 **	56.80

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	68-69
FROZEN TURKEYS Y TOMS 14-24#	66-70
FROZEN TURKEYS Y TOMS 24-28#	70-77

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	109-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	105-130

FRESH TURKEYS WITH TIMERS OR EQUIVALENT

U.S. GRADE A DELIVERED FIRST RECEIVERS, EASTERN REGION,
CENTS PER POUND, WEEK OF 29-MAR-2004

	(8-16#) HENS PRICE	(16-24#) LBS PRICE	(16-24#) TOMS PRICE	(16-24#) LBS PRICE
SALES (PROMOTIONS INCLUDED)	68.33	240	66.09	110
SALES (PROMOTIONS NOT INCLUDED)	68.33	240	66.09	110
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)		40		25

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS**

FEBRUARY	373,263*
MARCH 1-13, 2004	193,425*
To date 2004	945,641*
To date 2003	1,015,773*

* PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS

BY GEOGRAPHICAL AREAS W/E 20-Mar-2004
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
		PCT CHG PW	AVG LIVE WT	OLD BANDED HEAD-	AVG LIVE WT
-THOUSAND HEAD-					
N EAST	806	-7	21.90	(A)	807
SATL	700	-5	27.59	(A)	701
N CENT	1,883	0	32.90	(A)	1,883
S CENT	489	2	21.67	(A)	489
WEST	328	-2	23.03	(A)	328
U.S. TOTAL	4,206(B)	-2	27.85	2	4,208
TO-DATE					
2004	46,052(B)			90	46,142
TO-DATE					
2003	48,655(B)			174	48,829

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 56,000 for the year 479,000; last year to date 663,000.

LIVE TURKEYS SLAUGHTERED

		<u>YOUNG</u>		<u>YOUNG</u>		<u>OLD</u>		<u>TOTAL</u>	
		HENS	TOMS	BREEDERS					
		<u>THOUSANDS</u>							
HEAD	1,701	2,449	56	2	4,208				
AVG WT	15.71	36.35	24.01	62.32	27.85				
LAST WEEK	1,646	2,589	70	7	4,312				
SAME WK YR AGO	1,777	2,744	43	28	4,592				
AVG WT	15.79	36.29	25.25	28.94	28.21				
TO-DATE/2004	18,544	27,029	479	90	46,142				
TO-DATE/2003	18,966	29,026	663	174	48,829				

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 25 MARCH 2004.

The market on fresh tom breast meat was mostly steady, other white meats ranged steady to firm. Spot availability noted on frozen destrapped tenders. Frozen thigh trim moved at 42 cents delivered. Offers of tom drums continued to increase and were at lower trending prices. Demand was light for bulk parts. Market tone about steady for the adequate supplies of consumer sized bone-in breasts. Export activity was spotty. Livers traded at 21.5 cents FOB and frozen destrapped tenders at 185 delivered port.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	91.00	80
BREASTS, 4-8 LBS GRADE A--FRESH 2/		F	150.00	129
BREASTS, 4-8 LBS PLANT GRADE 2/	84.00		84.00	280
DRUMSTICKS, TOM		W	38.00	80
DRUMSTICKS, TOM--FRESH		W	43.00	160
DRUMSTICKS, HEN		F	44.00	80
WINGS, FULL-CUT, TOM		T	46.05	84
WINGS, FULL-CUT, HEN		R	46.00	9
WINGS, V-TYPE, TOM		W	33.32	95
WINGS, V-TYPE, HEN	81.00		81.00	20
NECKS, TOM	59.00		59.00	40
NECKS, HEN		R	62.00	14
BREASTS, B/S, TOM 3/	174.00		174.00	15
BREASTS, B/S, TOM--FRESH 3/		W	192.73	55
THIGH MEAT		R	90.00	40
THIGH MEAT--FRESH		T	90.00	20
BREAST TRIM MEAT		W	102.00	40
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS	170.00		170.00	40
DESTRAPPED TENDERS--FRESH		W	188.00	40
WING MEAT WITH SKIN		T	102.00	80
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED--FRESH 4/		W	36.00	40
EXPORT TRADING				
DRUMSTICKS, TOMS		R	49.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	30.00		30.00	40
TAILS		W	34.00	20
MECHANICALLY SEPARATED 4/				
THIGH MEAT - FROZEN	81.00-91.00		84.73	170

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 26 MARCH 2004.

The market on fresh tom breast meat continued mostly steady, wing meat with skin steady to fully steady, balance of white meat steady to firm. Demand on tom breast meat light, balance of white meat light to fair. Offerings of fresh tom breast meat ranged light to adequate, wing meat with skin light with some noting offerings not as tight as previous weeks', balance of white meat spotty. Trade sentiment on tom drums was steady to weak, however, some sellers were noting increased activity at the lower trending price levels. The market tone on tom necks was barely steady at best, tom full-cut wings steady and tom 2-joint wings steady to instances weak. Domestic trading centered on a heavy volume of fresh mechanically separated turkey and on a fair volume of fresh tom breast meat. Export trading was heavy on tom drums, balance light. Export inquiry was noted from Mexico and the Middle East. For domestic: fresh scapula 101, livers 20.50 pet foods frozen -20% MST -60 days age 25 cents delivered. Fresh MST traded at 37.50 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	91.00	80	91.00	80
BREASTS, 4-8 LBS GRADE A--FRESH 2/		F	150.00	129		
BREASTS, 4-8 LBS PLANT GRADE 2/	87.00		87.00	40	84.38	320
DRUMSTICKS, TOM	38.00		38.00	30	38.79	137
DRUMSTICKS, TOM--FRESH	38.00-44.00		39.60	100	41.69	260
DRUMSTICKS, HEN		F	44.00	80		
WINGS, FULL-CUT, TOM		T	46.05	84	46.05	84
WINGS, FULL-CUT, HEN						
WINGS, V-TYPE, TOM		W	33.32	95	33.32	95
WINGS, V-TYPE, HEN		R	81.00	20	80.69	29
NECKS, TOM	57.00-60.00		58.00	60	59.28	219
NECKS, HEN						
BREASTS, B/S, TOM 3/		R	174.00	15	174.00	15
BREASTS, B/S, TOM--FRESH 3/	188.00-193.00		188.53	227	189.41	310
THIGH MEAT						
THIGH MEAT--FRESH	92.00		92.00	60	91.50	80
BREAST TRIM MEAT	105.00		105.00	20	105.00	100
SCAPULA MEAT	105.00		105.00	20	105.00	20
TENDERLOINS						
DESTRAPPED TENDERS		R	170.00	40	170.78	180
WING MEAT WITH SKIN	101.00		101.00	20	101.80	100
DESTRAPPED TENDERS--FRESH	187.00-191.00		188.63	78	188.42	118
MECHANICALLY SEPARATED 4/						
MECHANICALLY SEPARATED--FRESH 4/	35.00-37.50		36.74	1,034	35.64	1,874
EXPORT TRADING						
DRUMSTICKS, TOMS	36.50		36.50	600	36.50	600
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	30.00	40	30.00	40
TAILS		W	34.00	20	34.00	20
MECHANICALLY SEPARATED 4/						
THIGH MEAT - FROZEN	88.50-91.00		89.83	120	89.25	1,130

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3/ Boneless and skinless without tenderloins.

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